

1 AUG 13 - 7 2018

UNITED STATES HOUSE OF REPRESENTATIVES

FORM B

FINANCIAL DISCLOSURE STATEMENT

For New Members, Candidates, and New Employees

Page 1 of 8
LEGISLATIVE RESOURCE CENTER

18 AUG 13 PM 1:08

OFFICE OF THE CLERK
U.S. HOUSE OF REPRESENTATIVES

Name: Stephen Marks Daytime Telephone: _____

New Member of or Candidate for U.S. House of Representatives State: Florida District: 27
Candidates - Date of Election: 8/28/2018

Check if Amendment ☐

New Officer or Employee Employing Office: _____ Staff Filer Type (if Applicable):
Shared ☐ Principal Assistant ☐

Period Covered: January 1, 2018 to 2018

(Office Use Only)

A \$200 penalty shall be assessed against any individual who files more than 30 days late.

PRELIMINARY INFORMATION - ANSWER EACH OF THESE QUESTIONS

<p>A. Did you, your spouse, or your dependent child:</p> <p>a. Own any reportable asset that was worth more than \$1,000 at the end of the reporting period? <u>or</u></p> <p>b. Receive more than \$200 in unearned income from any reportable asset during the reporting period?</p> <p>Yes <input checked="" type="checkbox"/> No <input type="checkbox"/></p>	<p>E. Did you hold any reportable positions during the reporting period or in the current calendar year up through the date of filing?</p> <p>Yes <input type="checkbox"/> No <input checked="" type="checkbox"/></p>
<p>C. Did you or your spouse have "earned" income (e.g., salaries, honoraria, or pension/IRA distributions) of \$200 or more during the reporting period?</p> <p>Yes <input checked="" type="checkbox"/> No <input type="checkbox"/></p>	<p>F. Did you have any reportable agreement or arrangement with an outside entity during the reporting period or in the current calendar year up through the date of filing?</p> <p>Yes <input type="checkbox"/> No <input checked="" type="checkbox"/></p>
<p>D. Did you, your spouse, or your dependent child have any reportable liability (more than \$10,000) at any point during the reporting period?</p> <p>Yes <input type="checkbox"/> No <input checked="" type="checkbox"/></p>	<p>J. Did you receive compensation of more than \$5,000 from a single source in the current year and two prior years?</p> <p>Yes <input checked="" type="checkbox"/> No <input type="checkbox"/></p>

ATTACH THE CORRESPONDING SCHEDULE IF YOU ANSWER "YES"
THIS FORM INCLUDES ONLY THE SCHEDULES THAT YOU ARE REQUIRED TO COMPLETE

EXCLUSION OF SPOUSE, DEPENDENT, OR TRUST INFORMATION - ANSWER BOTH OF THESE QUESTIONS

<p>TRUSTS - Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust that benefits you, your spouse, or dependent child?</p> <p>Yes <input type="checkbox"/> No <input checked="" type="checkbox"/></p>	<p>EXEMPTION - Have you excluded from this report any other assets, "unearned" income, or liabilities of a spouse or dependent child because they meet all three tests for exemption? Do not answer "yes" unless you have first consulted with the Committee on Ethics.</p> <p>Yes <input type="checkbox"/> No <input checked="" type="checkbox"/></p>
---	--

Page 2 of 8

Use additional sheets if more space is required.

Page 3 of 8

Use additional sheets if more space is required.

Page 4 of 8

INCOME LIMITS and PROHIBITED INCOME: Be advised that the income limit and prohibited income may apply to you after you are on House payroll. The 2017 limit on outside earned income for Members and employees compensated at or above the "senior staff" rate was \$27,765. The 2018 limit is \$28,050. In addition, certain types of income (notably honoraria, director's fees, and payments for professional services involving a fiduciary relationship) are totally prohibited for Members and senior staff.

[illegible]

SCHEDULE D - LIABILITIES

Name: Stephen Marks

Page 5 of 8

Report liabilities of over \$10,000 owed to any one creditor at any time during the reporting period by you, your spouse, or your dependent child. Mark the highest amount owed during the reporting period. **New Members:** Members are required to report all liabilities secured by real property including mortgages on their personal residence. **Exclude:** Any mortgage on your personal residence (unless you rent it out or are a Member); loans secured by automobiles, household furniture, or appliances; liabilities of a business in which you own an interest (unless you are personally liable); and liabilities owed to you by a spouse or the child, parent, or sibling of you or your spouse. Report a revolving charge account (i.e., credit card) only if the balance at the close of the reporting period exceeded \$10,000. *Column K is for liabilities held solely by your spouse or dependent child.

SP, DC, JT	Creditor	Date Liability Incurred MO/YR	Type of Liability	Amount of Liability										
				A	B	C	D	E	F	G	H	I	J	K
				\$10,001- \$15,000	\$15,001- \$50,000	\$50,001- \$100,000	\$100,001- \$250,000	\$250,001- \$500,000	\$500,001- \$1,000,000	\$1,000,001- \$5,000,000	\$5,000,001- \$25,000,000	\$25,000,001- \$50,000,000	Over \$50,000,000	Over \$1,000,000* (Spouse/DC Liability)
Example	First Bank of Wilmington, DE	5/98	Mortgage on Rental Property, Dover, DE				X							

SCHEDULE E - POSITIONS

Report all positions, compensated or uncompensated, as an officer, director, trustee of an organization, partner, proprietor, representative, employee, or consultant of any corporation, firm, partnership, or other business enterprise, nonprofit organization, labor organization, or educational or other institution other than the United States. **Exclude:** Positions held in any religious, social, fraternal, or political entities (such as political parties and campaign organizations); and positions solely of an honorary nature. **New Members and second-year candidates** report positions held in the reporting period and the current calendar year. **First-year candidates and new employees** report positions held in the current calendar year and two previous years.

Position	Name of Organization

SCHEDULE F - AGREEMENTS

Name: Stephen Marks Page 6 of 8

Identify the date, parties to, and general terms of any agreement or arrangement that you have with respect to: future employment; a leave of absence during the period of government service; continuation or deferral of payments by a former or current employer other than the U.S. government; or continuing participation in an employee welfare or benefit plan maintained by a former employer.

Date	Parties to Agreement	Terms of Agreement

SCHEDULE J - COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE

Report sources of compensation received by you or your business affiliation for services provided directly by you during the current year and two prior years. This includes the names of clients and customers of any corporation, firm, partnership, or other business enterprise if you directly provided the services generating a fee or payment of more than \$5,000. Exclude: Payments by the U.S. government and any information considered confidential as a result of a privileged relationship recognized by law. Do not repeat information listed on Schedule C.

Source (Name and City/State)	Brief Description of Duties
<i>Example:</i> Doe Jones & Smith, Hometown, Homestate	Accounting Services

Use additional sheets if more space is required.

LOAN: SEE NEXT PAGE for loans made to my account

Name: Stephen Marks	Page 7 of 8
---------------------	-------------

Stephen Marks

of

[illegible]

Use additional sheets if more space is required.

FILER NOTES
(Optional)

Name: Stephen Marks Page 8 of 8

Page 8 of 8

[illegible]

Use additional sheets if more space is required.

**THIS INSTRUMENT PREPARED BY AND
IS TO BE RECORDED AND RETURNED TO:**

LAWRENCE E. BLACKE, ESQ.
3326 North East 33rd Street
Fort Lauderdale, Florida 33308-7110
(954) 566-3070

Property Appraisers Parcel I.D. (Folio) Number: 4941 05 BF 0040

TRUSTEES' DEED
(Testate)

THIS INDENTURE Made the 18th day of MAY, 2018, by and between LAWRENCE BRUCE MARKS whose address is 113 Muir Lane, Chapel Hill, NC 27514 and STEPHEN MARKS whose address is 9587 Weldon Circle, Unit #104, Tamarac, FL 33321, as Successor Co-Trustees of the Hyman and Helen Marks Revocable Trust Dated October 15, 2016 and LAWRENCE BRUCE MARKS, Individually, first parties, to STEPHEN MARKS, a single man, whose address is 9587 Weldon Circle, Unit #104, Tamarac, FL 33321, second party.

WITNESSETH: That the said first parties, for and in consideration of the sum of \$10.00 in hand paid by the said second party, the receipt whereof is hereby acknowledged, do hereby remise, release and quit-claim unto the said second party forever, any and all rights, title and interest, claims and demands which the said first parties have in and to the following described lots, pieces or parcels of land, all situate, lying and being in the County of Broward, State of Florida, to-wit:

Unit 104, of WELDON CONDOMINIUM B., according to the Declaration of Condominium thereof, as recorded in Official Records Book 24071, Page 433, and any amendments thereto, of the Public Records of Broward County Florida.
Also known as: 9587 Weldon Circle, Unit #104, Tamarac, FL 33321

TOGETHER with all the tenements, hereditaments and appurtenances thereto belonging or in anywise appertaining.

To have and to hold the same together with all and singular the appurtenances thereunto belonging or in anywise appertaining, and all the estate, right, title, interest, lien, equity and claim whatsoever of the said first party, other in law or equity, or the only proper use, benefit and behoof of the said second party forever.


IN WITNESS WHEREOF, the said first parties have signed and sealed these presents the day and year first above written.

Signed, sealed and delivered in our presence:

WITNESSES


Print Name: REBECCA A. MOORE


Print Name: Dana R. Bell

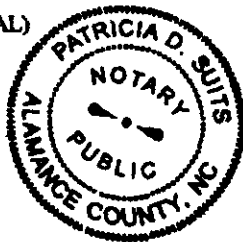
 (L.S.)
LAWRENCE BRUCE MARKS, Individually and
as Successor Co-Trustee
113 Muir Lane
Chapel Hill, NC 27514

STATE OF NORTH CAROLINA)
COUNTY OF Orange)

I HEREBY CERTIFY that on this day, before me, an officer duly authorized to take acknowledgments, personally appeared LAWRENCE BRUCE MARKS, individually and as Successor Co-Trustee, to me known to be the persons described in and who executed the foregoing instrument and he acknowledged before me, under oath, that he executed the same.

WITNESS my hand and official seal in the County and State last aforesaid this 18th day of May, 2018.

(SEAL)



Patricia D. Swits
Notary Public - STATE OF NORTH CAROLINA
Print Name: Patricia D. Swits

My commission expires: May 25, 2022

Signed, sealed and delivered in our presence:

WITNESSES:

Carolyn Seckinger
Print Name: CAROLYN SECKINGER

Susan Lunden
Print Name: SUSAN LUNDEN

Stephen Marks (U.S.)
STEPHEN MARKS, Successor Co-Trustee
9587 Weldon Circle, #104
Tamarac, FL 33321

STATE OF FLORIDA
COUNTY OF Broward

I HEREBY CERTIFY that on this day, before me, an officer duly authorized to take acknowledgments, personally appeared STEPHEN MARKS, as Successor Co-Trustee, to me known to be the persons described in and who executed the foregoing instrument and he acknowledged before me, under oath, that he executed the same.

WITNESS my hand and official seal in the County and State last aforesaid this 17th day of May, 2018.

(SEAL)

Notary Public - STATE OF FLORIDA

Print

SUSAN R DYER

Name:



WELLS
FARGO

ADVISORS

SNAPSHOT

Current period ending June 30, 2018

ACCOUNT NAME:

STEPHEN MARKS BENE IRA
HYMAN MARKS (DECD)
WFCS AS CUSTODIAN

ACCOUNT NUMBER:

[REDACTED]

Your Financial Advisor:

RICHMAN/GROSS

Phone: 917-351-2000 / 800-223-0610

ONE PENN PLAZA
27TH FLOOR
NEW YORK NY 10119

If you have more than one account with us, why not link them and receive summary information for your entire household? Contact Your Financial Advisor for more details.

Message from Wells Fargo Advisors

DID YOU KNOW YOU CAN RECEIVE YOUR TRADE CONFIRMATIONS AND TAX INFORMATION ONLINE? PLEASE CONTACT YOUR FINANCIAL ADVISOR FOR MORE INFORMATION AND THE STEPS YOU CAN TAKE TO HELP MAKE THIS HAPPEN.

STEPHEN MARKS BENE IRA
HYMAN MARKS (DECD)
WFCS AS CUSTODIAN
9587 WELDON CIR APT B104
TAMARAC FL 33321-0940

Investments and Insurance products are:

NOT FDIC-INSURED

NO BANK GUARANTEE

MAY LOSE VALUE

Wells Fargo Advisors is a trade name used by Wells Fargo Clearing Services, LLC, a registered broker-dealer and non-bank affiliate of Wells Fargo & Company.

SNAPSHOT

STEPHEN MARKS BENE IRA
HYMAN MARKS (DECD)
WFCS AS CUSTODIAN

JUNE 1, 2018 - JUNE 30, 2018
ACCOUNT NUMBER [REDACTED]

Progress summary

	THIS PERIOD	THIS YEAR
Opening value	\$55,581.29	\$69,234.08
Cash deposited	0.00	10.85
Securities deposited	0.00	0.00
Cash withdrawn	0.00	-13,002.41
Securities withdrawn	0.00	0.00
Change in value	207.63	-453.60
Closing value	\$55,788.92	\$55,788.92

As a Wells Fargo Advisors client, you can upgrade your investment account to add Brokerage Cash Services at no additional cost. Brokerage Cash Services provides access to convenient money movement options including mobile deposit services. It also includes teller deposit services at Wells Fargo branch locations which are provided through a limited purpose Bank account. You'll have access to many more features and benefits to help you manage your finances. It's as simple as talking with Your Financial Advisor. Ask them today about Brokerage Cash Services.

Portfolio summary

ASSETS	ASSET TYPE	PREVIOUS VALUE ON MAY 31	%	CURRENT VALUE ON JUN 30	%	ESTIMATED ANN. INCOME
Cash and sweep balances		286.92	0.52	406.65	0.73	1
Stocks, options & ETFs		0.00	0.00	0.00	0.00	0
Fixed income securities		22,781.69	40.99	22,781.31	40.83	376
Mutual funds		32,512.68	58.50	32,600.96	58.44	929
Asset value		\$55,581.29	100%	\$55,788.92	100%	\$1,306

WELLS
FARGO

ADVISORS

SNAPSHOT

Current period ending June 30, 2018

ACCOUNT NAME:

STEPHEN MARKS

ACCOUNT NUMBER:

[REDACTED]

Your Financial Advisor:
RICHMAN/GROSS
Phone: 917-351-2000 / 800-223-0610

ONE PENN PLAZA
27TH FLOOR
NEW YORK NY 10119

If you have more than one account with us, why not link them and receive summary information for your entire household? Contact Your Financial Advisor for more details.

Message from Wells Fargo Advisors

DID YOU KNOW YOU CAN RECEIVE YOUR TRADE CONFIRMATIONS AND TAX INFORMATION ONLINE? PLEASE CONTACT YOUR FINANCIAL ADVISOR FOR MORE INFORMATION AND THE STEPS YOU CAN TAKE TO HELP MAKE THIS HAPPEN.

News

GET MORE DONE IN LESS TIME WITH WELLS FARGO MOBILE DEPOSIT. DEPOSIT CHECKS INTO YOUR BROKERAGE ACCOUNT WITH CASH SERVICES USING THE WELLS FARGO MOBILE APP ON YOUR MOBILE DEVICE. IT'S FAST, EASY, AND SECURE.

STEPHEN MARKS
9587 WELDON CIR APT B104
TAMARAC FL 33321-0940

Wells Fargo Advisors is a trade name used by Wells Fargo Clearing Services, LLC, a registered broker-dealer and non-bank affiliate of Wells Fargo & Company.

Investments and Insurance products are:

NOT FDIC-INSURED

NO BANK GUARANTEE

MAY LOSE VALUE

SNAPSHOT

STEPHEN MARKS

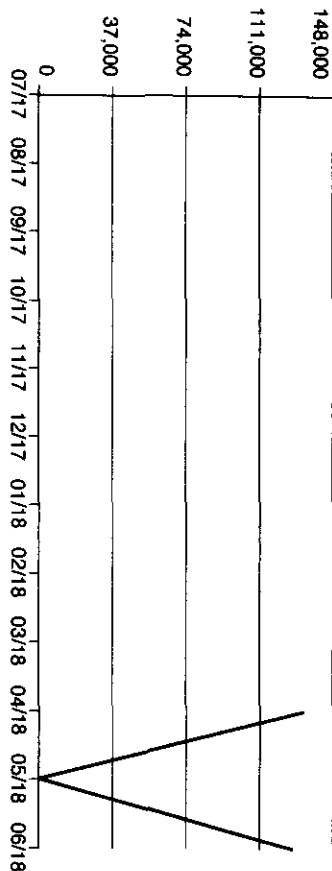
JUNE 1, 2018 - JUNE 30, 2018

ACCOUNT NUMBER

Progress summary

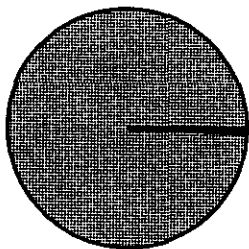
	THIS PERIOD	THIS YEAR
Opening value	\$29.19	\$0.00
Cash deposited	127,766.58	355,575.01
Securities deposited	0.00	304,969.50
Cash withdrawn	-37.03	-532,843.42
Securities withdrawn	0.00	0.00
Change in value	-21.91	35.74
Closing value	\$127,736.83	\$127,736.83

Value over time



Portfolio summary

CURRENT



ASSETS



Cash and sweep balances
Stocks, options & ETFs
Fixed income securities
Mutual funds

Asset value

ASSET TYPE	PREVIOUS VALUE ON MAY 31	%	CURRENT VALUE ON JUN 30	%	ESTIMATED ANN. INCOME
Cash and sweep balances	-126,979.70	0.00	752.07	0.59	2
Stocks, options & ETFs	0.00	0.00	0.00	0.00	0
Fixed income securities	127,008.89	100.00	126,984.76	99.41	2,223
Mutual funds	0.00	0.00	0.00	0.00	0
Asset value	\$29.19	100%	\$127,736.83	100%	\$2,225

Negative values are not included in percent calculations.

WELLS
FARGO

ADVISORS

Electronic Delivery

THE HYMAN AND HELEN MARKS REVO
C/O LAWRENCE MARKS TR
LAWRENCE MARKS TTEE ET AL
U/A DTD 10/15/2016
113 MUIR LANE
CHAPEL HILL NC 27514-1452

SNAPSHOT

Current period ending June 30, 2018

ACCOUNT NAME:

THE HYMAN AND HELEN MARKS REVO
C/O LAWRENCE MARKS TR
LAWRENCE MARKS TTEE ET AL
U/A DTD 10/15/2016

ACCOUNT NUMBER:

Your Financial Advisor:

RICHMAN/GROSS
Phone: 917-351-2000 / 800-223-0610

ONE PENN PLAZA
27TH FLOOR
NEW YORK NY 10119

If you have more than one account with us, why not link them and receive summary information for your entire household? Contact Your Financial Advisor for more details.

Message from Wells Fargo Advisors

DID YOU KNOW YOU CAN RECEIVE YOUR TRADE CONFIRMATIONS AND TAX INFORMATION ONLINE? PLEASE CONTACT YOUR FINANCIAL ADVISOR FOR MORE INFORMATION AND THE STEPS YOU CAN TAKE TO HELP MAKE THIS HAPPEN.

News

GET MORE DONE IN LESS TIME WITH WELLS FARGO MOBILE DEPOSIT. DEPOSIT CHECKS INTO YOUR BROKERAGE ACCOUNT WITH CASH SERVICES USING THE WELLS FARGO MOBILE APP ON YOUR MOBILE DEVICE. IT'S FAST, EASY, AND SECURE.

Wells Fargo Advisors is a trade name used by Wells Fargo Clearing Services, LLC, a registered broker-dealer and non-bank affiliate of Wells Fargo & Company.

Investments and insurance products are:

NOT FDIC-INSURED

NO BANK GUARANTEE

MAY LOSE VALUE

SNAPSHOT
001 54 54H7



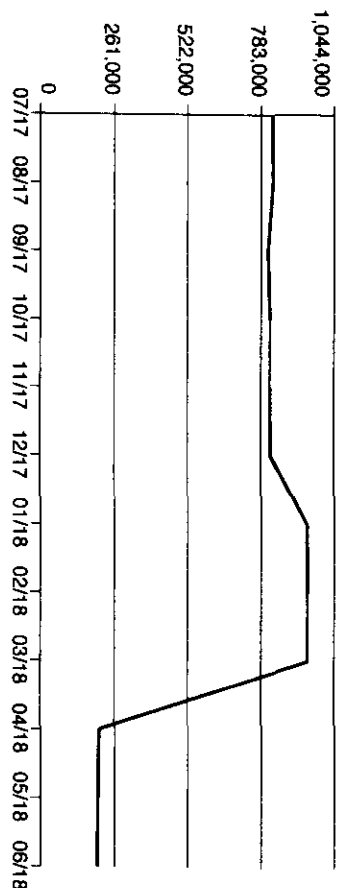
SNAPSHOT

THE HYMAN AND HELEN MARKS REVO
C/O LAWRENCE MARKS TR
LAWRENCE MARKS TTEE ET AL, *Stephen Marks*
U/A DTD 10/15/2016
JUNE 1, 2018 - JUNE 30, 2018
ACCOUNT NUMBER [REDACTED]

Progress summary

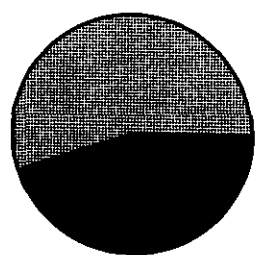
	THIS PERIOD	THIS YEAR
Opening value	\$203,381.78	\$815,938.54
Cash deposited	0.00	144,676.76
Securities deposited	0.00	0.00
Cash withdrawn	0.00	-61,681.22
Securities withdrawn	0.00	-696,780.20
Change in value	-1,828.94	-601.04
Closing value	\$201,552.84	\$201,552.84

Value over time

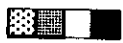


Portfolio summary

CURRENT



ASSETS



Cash and sweep balances
Stocks, options & ETFs
Fixed income securities
Mutual funds

ASSET TYPE	PREVIOUS VALUE ON MAY 31	%	CURRENT VALUE ON JUN 30	%	ESTIMATED ANN. INCOME
Cash and sweep balances	90,413.78	44.46	90,428.64	44.87	181
Stocks, options & ETFs	0.00	0.00	0.00	0.00	0
Fixed income securities	112,968.00	55.54	111,124.20	55.13	3,780
Mutual funds	0.00	0.00	0.00	0.00	0
Asset value	\$203,381.78	100%	\$201,552.84	100%	\$3,961